



# The County of San Luis Obispo, Central Services

REQUEST FOR PROPOSAL #1348

Tax Collector Printing and Mailing Services

Due: 03/18/2016

Time 3:00 P.M.

RESPONSE TO

**COUNTY OF SAN LUIS OBISPO**

**JUSTIN HANSEN, CENTRAL SERVICES - PURCHASING**

PRESENTED BY

Robert Crawford

Territory Sales Manager

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# Table of Contents

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<b><u>TABLE OF CONTENTS</u></b>	<b><u>1</u></b>
<b><u>FIRM QUALIFICATIONS</u></b>	<b><u>2</u></b>
<b><u>UNDERSTANDING OF AND APPROACH TO THE PROJECT</u></b>	<b><u>7</u></b>
<b><u>FEES AND INSURANCE</u></b>	<b><u>10</u></b>
<b><u>RESPONSE TO THE SCOPE OF WORK</u></b>	<b><u>13</u></b>
<b><u>APPENDIX A: ADDITIONAL COMPANY INFORMATION</u></b>	<b><u>22</u></b>

## Firm Qualifications

InfoSend Incorporated is pleased to present this response to the County of San Luis Obispo based on its Request for Proposals # 1348 for Tax Collector Printing and Mailing Services, due March 18<sup>th</sup>, 2016. The InfoSend team is confident that our offering and benefits presented herein will provide the County and its residents with the greatest value in the market today. This response is valid for 90 days from receipt of the proposal. InfoSend (**Federal Tax Identification Number 33-0748516**) is a privately held California corporation, incorporated in 1997, with 104 current employees and annual sales of approximately 58 million dollars that delivers more than 115 million print/electronic documents per year. InfoSend's core competencies are information technology, data processing, document formatting, and document production/delivery. The Software as a Service (SaaS) approach allows InfoSend to continually refine its services and equipment without requiring software installation and maintenance at your site.

### Corporate Owned Facilities

Corporate Headquarters & Western US Production Facility	4240 E. La Palma Ave • Anaheim CA 92807
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InfoSend currently owns and operates its 77,000 sq. ft. headquarters and Western US production facility. This facility sits on a 4.3-acre lot and is one of the premier bill processing centers in California. *This facility has a 600KW backup generator that can power the entire facility if the electricity goes out.* It provides disaster recovery to the other facilities. InfoSend's Anaheim facility is designated as a USPS Detached Mail Unit (DMU) with USPS representatives on-site.

Midwest & Northeastern US Production Facility	1406 Centre Circle • Downers Grove IL 60515
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InfoSend's 25,000 sq. ft. Midwest production and disaster recovery facility is located just west of Chicago, Illinois. This facility is used to process mail for clients located in the Midwest or Northeast. The facility also serves as an out of state disaster recovery facility for the other facilities. InfoSend Midwest is also a USPS DMU with USPS representatives on-site.

Texas & Southeastern US Production Facility	1624 W Crosby Road #128 • Carrollton TX 75006
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InfoSend's 10,000 sq. ft. Texas Production facility is located near Dallas and is the main production center for clients in the South and the Southeast. This facility also provides out-of-state disaster recovery for InfoSend's other locations.

### InfoSend Advantages and Differentiators

- Completely integrated electronic and printed output options.
- Highest quality processing with secure and auditable processes.
- Online job tracking, customer service, and SLA & production details.
- Hosted document archive and web presentment options.
- Sophisticated front-end processing system (featuring InfoSend's own software)
- Close proximity to major USPS airport hub for each of our facilities
- InfoSend's web-based reporting portal provides San Luis Obispo the ability to manage its print operations remotely
- InfoSend is **PCI Compliant**.
- InfoSend offers a fully redundant processing solution, with mirrored facilities (not simply multiple locations).
- Specializes in supporting the multiple departments of municipalities and has the tools and experience necessary to streamline the processing of a variety of receivables.

### Summary

The InfoSend solution is a complete, proven technology practice that includes print/finish/mail services, an enhanced print and delivery process. InfoSend provides unequalled technical support, based on our proven experience and largest investment in our R&D roadmap. We believe that efficiencies can be improved by introducing new thoughts and ideas. We are proud to say that in 20 years we have never had a Municipal customer discontinue services with InfoSend due to programming, production, quality, customer service, or operational issues. We think that makes us pretty unique in our industry. We firmly believe that entering into a partnership with the County will result in an efficient and cost effective back office operation. Thank you for this opportunity to present our services.



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Anaheim, CA 92807  
Phone: 1-800-955-9330

InfoSend is a proud member and supporter of:



## Solution Overview

InfoSend has provided business process outsourcing services since 1996. Since that time InfoSend has provided the processing and handling of critical documents for industries, including property tax billing, throughout the United States. Utilizing the most current technology, InfoSend offers an innovative approach with flexible and secure solutions for organizations seeking outsourced data processing, printing and mailing (DPPM), and electronic presentment and or payment capabilities (EBPP). Keeping InfoSend as your outsourcing partner will continue to significantly reduce total overhead costs. Together, we can reach your customers more effectively.

### DPPM: Data Processing, Print, and Mail Service

- Cloud-based data processing of raw data and print files.
- Print statements, invoices, letters, postcards, notices, or other various documents.
- USPS Postal presorting to the lowest available rates
- Fully implemented Full-service Intelligent Mail Barcode
- Printing of data in grayscale, spot color, or **full color**.
- Inserts and special flyers can be used to target specific customers. Submit your printed materials or artwork to be printed by InfoSend in grayscale or color.
- Quick turn-around of document folding, inserting, presorting, and delivery to the USPS.

### eBusiness Products

- Electronic billing and payment related products hosted in the cloud.
- All Payment-Related eBusiness Products are Level 1 PCI Compliant
- Online BillPay (EBPP) and/or QuickPay (No Enrollment)
- Email eBilling
- CSRPAY

### Shared Platform Benefits

- One data processing platform manages the import and handling of your data files. This core system can then output the information to all delivery channels.
- Upload data via our secure website, FTP with optional PGP encryption, or SFTP.
- Bill redesign consulting – we create your new document look and feel and then our document composition creates bill images for both printed and paperless bills.
- Web-based system to track and view samples of print or eBills before they are sent.
- A variety of standard reports can be accessed via web portal or emailed to you.
- Create and schedule document messages by customer type or account number.
- Bill design, mailing options, and EBPP business rules are tailored to suit your organization's needs.
- Simplify your process by partnering with a provider to consult and manage your entire bill formatting and delivery needs.

### Partnered Solutions

- InfoSend has partnered with PayNearMe to provide a unique cash payment solution. Your bills can be redesigned to contain a barcode that is scanned by the POS system at participating retailers.
- FedEx Shutoff Notification – replace manual door hangers with notifications sent via FedEx with tracking-verified delivery

## Personnel

### Contract Administrator/Managers:

InfoSend designated Contract Administrator: Russ Rezai, COO

InfoSend designated Contract Manager: Matt Schmidt, Director of Client Services

InfoSend sales contact: Robert Crawford, Territory Sales Manager

### Staffing:

- **Executive Management and Sales Team:** will serve as the County's main contact for RFP questions and contract negotiations.
- **Client Services Team:** main points of contact during BillPrint & Mail installation. The Client Services team will work extensively with the County's project team.
- **IT team:** will provide back-end support for San Luis Obispo's jobs. Will work in conjunction with InfoSend Client Services during implementation and actively monitors program functions after client go-live.

Matt Schmidt is InfoSend's Director of Client Services, responsible for overseeing new implementation projects led by InfoSend's Account Managers. An experienced Account Manager from our Client Services department will be assigned to your project. Matt leads our Client Services team, his department is in touch with our clients most frequently and handles online training and support, a member of his team is available 8 am to 6 pm Mountain Time at our 800.955.9330 number.

<b>NAME</b>	<b>Matt Schmidt</b>
<b>EXPERIENCE</b>	<p><b>InfoSend, Inc.</b> Anaheim, CA (2007 – present)  Director, Client Services</p> <ul style="list-style-type: none"> <li>• Oversee new client implementations for BillPrint and eBusiness clients</li> <li>• Manage support staff and ongoing client support functions</li> <li>• Work with programming and client services team to streamline processes and improve procedures</li> <li>• Managed more than 75 implementation and conversion projects</li> </ul> <p><b>Modern Safety Supply</b> Fullerton, CA (2003-2007)  Account Manager</p> <ul style="list-style-type: none"> <li>• Developed and managed accounts to ensure continued growth and profitability for both parties</li> </ul>
<b>Education</b>	<p>BA Business Administration, California State University, Chico: December 2002  Inductee- Beta Gamma Sigma, 2001  MBA University of California, Irvine</p> <p>Proficient in Website/Forms Design using Following Applications/Languages:  HTML, Crystal Reports, Adobe Illustrator</p>

Vedat Aral leads our I.T. team and has supervised programming for more than 100 installations.

<b>NAME</b>	<b>Vedat Aral</b>
<b>EXPERIENCE</b>	<p><b>InfoSend, Inc.</b> Anaheim, CA (2004 – present)  Director, I.T.</p> <ul style="list-style-type: none"> <li>▪ Manages research and development</li> <li>▪ New product and service development and deployment – including Data Processing Print and Mail, and eBusiness Services</li> </ul> <p><b>Gourmet Shuttle</b> Huntington Beach, CA (2002 – 2003)  Software Engineer</p> <p><b>Denge Bilisim</b> Istanbul, Turkey (1994 – 2001)  Owner, Software Engineer</p>
<b>Education</b>	<p>MFA, Cinema &amp; TV 1997, Marmara University – Istanbul Turkey</p> <p>BS, Computer Science &amp; Engineering 1991, Hacettepe University – Ankara Turkey</p> <p>Proficient in Website/Forms Design using Following Applications/Languages:  Mainframe, IBM S/36-AS/400, K-Series  COBOL, RPG, Visual Basic, Visual FoxPro, Delphi, C#, ASP.NET  SABRE, HDLC, X.25, Mercator, EDIHTML, Crystal Reports, Adobe Illustrator</p>

## Solano County Tax

Solano County has been an InfoSend client since 2012. They process over 200,000 mail pieces annually which consist of Secured, Secured Delinquent, Un-Secured, and Supplemental Property Tax documents. These documents are printed on 3 custom forms, revised yearly. It was expected of InfoSend to meet the following requirements:

- Deadline specific mailing of Tax notices
- Yearly supply of custom forms and envelopes sent directly to the County
- Web portal which allows for the review and reprinting of prior documents, providing a variety of search and sort options.
- Print different messages on bills based upon predetermined criteria, such as Cortac Agency
- Insert variable number of remit envelopes based upon predetermined criteria such as Cortac or Macno recipient types
- Transfer of individual output PDF's directly to clients with Accessor Parcel Numbers as naming convention
- Live OCR testing prior to each mailing
- Householding of documents using predetermined criteria
- Annual inserting of supplemental materials

All requirements were fully met and supported. The implementation process involved a technical point of contact, business point of contact and a primary account manager for both parties. In addition to weekly calls to track the progress of the project a progress status report was also used to ensure completion of action items and deadlines.

InfoSend also works with Solano County on an ongoing basis to provide modifications and improvements to their application with minimal impact to County resources. Among the recent improvements made were a client requested addition of a Redemption bill using PDF data to their print and mail document types. Currently the County and InfoSend are collaborating on converting their printing to use our Inkjet printers, eliminating their needs to use custom forms.

## Client References

InfoSend is a market leader for utilities and government agencies. We have never lost a client because of service issues or delays in mail delivery. We currently have approximately 275 municipal utility, water district, and government agency clients that either use the turnkey Data Processing Print & Mail solution, the Online BillPay solution, or both solutions.

InfoSend does its absolute best to ensure that each client is completely satisfied with our customer service, mail turnaround, and quality of work. We are currently servicing over 350 clients total and will be happy to provide you with additional references upon your request.

<b>County of Butte, CA</b>	(530) 538-7539
25 County Center Dr.	Lisa Lam, Supervisor-Taxes & Staff Services
Oroville, CA 95965	LLam@buttecounty.net
<p>The County of Butte CA selected InfoSend in July 2011 to print and mail 80K Secured, 50K Assessee, 13K Unsecured and 12K Supplemental Tax Bills, annually. The County of Butte sends InfoSend electronic bill print files from their Megabyte Property Tax System.</p> <p><b>Billing System:</b> Megabyte Property Tax System  <b>Volume:</b> 156,000 annual  <b>InfoSend Products Used:</b> Data Processing Print and Mail</p>	

<b>County of Solano, CA</b>	(707) 784-6305
1745 Enterprise Drive, Suite A	Lori Butler-Slappy, Tax Collections Manager
Fairfield, CA 94533	LESlappy@SolanoCounty.com
<p>InfoSend won Solano County's business and began producing Secured, Unsecured, Delinquent and Supplemental Property Tax Statements in May of 2012. InfoSend processes electronic raw data bill print files from the County's system.</p> <p><b>Volume:</b> 180,000 Secured Property Tax, 20,000 Unsecured, 20,000 Supplemental Statements, annually  <b>InfoSend Products Used:</b> Data Processing Print and Mail</p>	

<b>County of Ventura, CA</b>	(805) 378-3006
800 South Victoria Avenue	Derek Fouarge
Ventura, CA 93009	Derek.Fouarge@ventura.org
<p>Ventura County has been with InfoSend since 2012. InfoSend produces Secured, Unsecured, Delinquent Tax Notices and Supplemental Tax Bills for the County.</p> <p><b>Volume:</b> 255,000 Secured, 30,000 Unsecured, 25,000 Delinquent Notices  <b>InfoSend Products Used:</b> Data Processing Print and Mail</p>	

<b>County of Sutter, CA</b>	(530) 822-7117 x 105
512 Second Street	Christina Hernandez, Treasurer-Tax Collector Staff Analyst
Yuba City, CA 95991	CHernandez@co.sutter.ca.us
<p>Sutter County has been a client since 2015, partnering with InfoSend following an RFP win. InfoSend produces Secured, Unsecured, Reminder Tax Notices and Supplemental Tax Bills for the County.</p> <p><b>Volume:</b> 46,000 Secured, 6,000 Unsecured, 6,000 Reminder Notices, 5,000 Supplemental  <b>InfoSend Products Used:</b> Data Processing Print and Mail</p>	

# Understanding of and Approach to the Project

## Implementation

InfoSend's standard Data Processing Printing and Mailing (DPPM) implementation timeline is 6 weeks for PDF data. InfoSend requests that sample data files and field definitions are provided as soon as possible after bid award. Oftentimes implementation projects can take longer than the 6-week timeline due to a client's hesitation to provide required deliverables. InfoSend has implemented hundreds of new clients and will engage the County during the implementation process to ensure that needs are met and that the County's desired output in terms of contents and layout is attained.

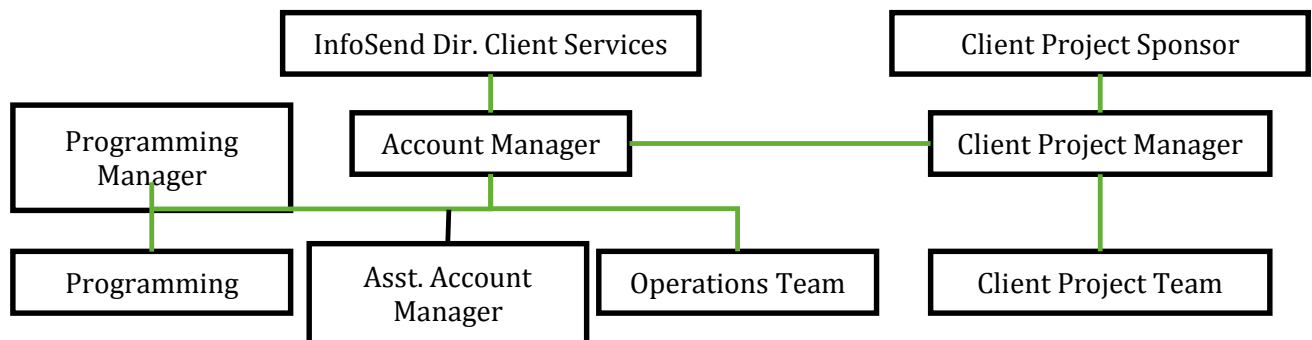
### Project Planning

- Each project begins with a pre-implementation and Requirements Gathering phase
- During this period, your Account Manager (AM) gathers test files, sample document layouts, and any service options not specified in the RFP from your Project Manager.
- The designated AM will review San Luis Obispo's requirements and any custom programming that may be apply.
- InfoSend's Director of Client Services will work with the AM to develop a project framework and completion timeline that will meet specified requirements.
- InfoSend expects San Luis Obispo's requirements will fit into a standard work breakdown structure (WBS) for the BillPrint Implementation. Any variation to the standard WBS based on analysis of client requirements will be integrated into the project plan during the planning phase.
- The completion timeline will be reviewed by all parties to ensure that expectations are met, and that the requirements and project milestones are clearly communicated and understood.

### Organization and Control

- InfoSend anticipates that the structure of the project teams will be organized as illustrated in the outline below:

## Project



- The AM will be the main point of contact for San Luis Obispo during the implementation. The AM will lead a cross-functional team that will develop all aspects of San Luis Obispo's application.
- The task of monitoring and controlling the project will be coordinated by a Control Team consisting of the Director of Client Services, the AM, and the Programming Manager.
- The Control Team will be involved in monitoring the progress of the project and in evaluating any changes to the scope to meet client requirements.
- The Control Team will meet to review weekly status reports from the project team and take corrective action as needed to ensure that the project remains on pace for the completion targets.
- The AM assigned to this project will also coordinate a weekly call with San Luis Obispo staff to discuss project progress and to provide updates on the implementation effort.



### InfoSend Roles and Responsibilities:

It is our goal at InfoSend to make San Luis Obispo's transition to our outsourced Print & Mail services a timely and efficient process. All communications between InfoSend and San Luis Obispo will be routed through the designated InfoSend Sales Rep and/or Account Manager. Account Managers have been trained to adhere to the implementation procedures, and are responsible for guiding you through implementation items. With active participation, San Luis Obispo's print and mail jobs should progress according to schedule.

### InfoSend Resource Commitments:

- **Executive Management and Sales Team:** will serve as the County's main contact for RFP questions and contract negotiations.
- **Client Services Team:** main points of contact during BillPrint & Mail installation. The Client Services team will work extensively with the County's project team.
- **IT team:** will provide back-end support for San Luis Obispo's jobs. Will work in conjunction with InfoSend Client Services during implementation and actively monitors program functions after client go-live.

### The County of San Luis Obispo's Roles and Responsibilities:

In order to ensure a successful and efficient implementation project, InfoSend asks that the County assign a dedicated project coordinator that will serve as InfoSend's main point of contact during the course of the project. In order for us to perform our job successfully, InfoSend will rely on San Luis Obispo's participation and input throughout the implementation process. We ask that the County, to the best of its ability, adhere to the timing guidelines referenced in this response. Items such as test files, statement design sign-off, forms and envelope orders, and barcode testing and approval are all time-sensitive and need to be attended to before a client is able to go live. The County of San Luis Obispo's designated Account Manager will work with your project team to ensure that the project remains on task so that go-live dates will be met.

### County of San Luis Obispo's Resource Commitments:

- Project Team
  - Conference calls to discuss project updates
  - Attentive communication with designated InfoSend Account Manager
  - Provide information as needed in order to facilitate InfoSend in keeping project on task

### Data Processing, Print and Mail Service 6-Week xPDF Implementation Timeline

Document Purpose:
This document provides details on the scheduling for a standard new client on-board for InfoSend. This is an estimated schedule outlining a full DPPM implementation for PDF input files. While certain tasks can be performed concurrently, the project workflow will follow the general outline presented below.
Intended Recipients:
InfoSend and Prospect Staff

Milestone:	Responsibility
<b>Week 1:</b>	
Client provides notice to proceed.	Client
Client provides sample PDF's export of desired outputs	Client
Initial project requirements gathering call is held	InfoSend and Client
Requirements for processing and document outputs are gathered and reviewed	InfoSend PM
Initial document mock-up development process (if needed)	InfoSend PM
<b>Week 2:</b>	
Mock-ups are provided to the client for review and feedback (if needed)	InfoSend PM
Account Manager provides programming requirements to DPPM team	InfoSend PM
Adjustments to mock-ups are made and presented to client for review.	InfoSend PM
Programmer reviews the data file and meets with Account Manager to discuss any programming questions	InfoSend IT
Clarification is obtained on any questions which arise during the programming review	InfoSend PM

<b>Week 3:</b>	
Client approves and signs-off on final versions of mock-ups	Client
InfoSend to provide a detailed Statement of Work outlining project requirements, goals, responsibilities, and success criteria	InfoSend PM
Client reviews and signs-off on finalized SOW	Client
InfoSend application development begins for the project	InfoSend
<b>Week 4:</b>	
InfoSend conducts an internal review of the samples and provides input to programming team	InfoSend PM
Account Manager input is incorporated into the samples, and approved samples are presented to client	InfoSend IT
Client reviews the first set of samples	Client
Conference call is held to review the first set of samples is held	InfoSend and Client
<b>Week 5:</b>	
Client input for first round of samples is communicated to programming	InfoSend
Account Manager finalizes custom materials specifications and orders are placed (if applicable)	InfoSend PM
Account Manager sends samples of OCR line/barcode for approval.	InfoSend PM
<b>Week 6:</b>	
Client approves outputs	Client
Account Manager coordinates internal application testing simulating first live output run	InfoSend AM
Account Manager provides training to client's group on InfoSend.com site	InfoSend and Client
Account Manager coordinates first run Quality Control procedures with InfoSend Operations staff	InfoSend AM
First outputs are printed and mailed.	InfoSend
InfoSend conducts internal project review	InfoSend AM
<b>Ongoing</b>	
Follow-up meeting is held between project teams. Responsibilities for any pending tasks are assigned	InfoSend PM

## Fees and Insurance

### Pricing: Data Processing, Print & Mail Service Set-up Fee

InfoSend's Fees – Initial Set-up Costs Implementation, professional services, and optional services fees.			
Professional Services Fees	Please pick from one of the options below:		
	<b>Express PDF Implementation: WAIVED</b> With this option you control the formatting of your documents and do not pay maintenance fees.  Please note that Clients must sign off on requirements documents (Statement of Work, project plan, etc.) before programming and system configuration can begin. Client can be charged additional fees and/or have the project go-live date delayed if requirements are changed after they have been finalized and signed off.		
	<b>Professional Services Fee</b> Per hour and performed only upon request. For customizations made to your data processing application after go-live. Work is only started after receiving your approval of a formal quote.	Per Hour	\$150.00

### Pricing: Data Processing, Print & Mail Service Fees

InfoSend's Fees – Turnkey Data Processing, Print & Mail Service:			
The individual prices shown in the table below apply only to the turnkey Data Processing Print & Mail service for the following document types. Other types of document printing and or mailing can be quoted later, if needed.			
Primary Services	<b>Turnkey Data Processing Print &amp; Mail service</b>  Price is per physical page. Includes processing of your unique data, CASS address validation, presorting, printing, and mail insertion.  <b>Excludes materials (see Material Component Fees below), sales tax (where applicable), and postage.</b>  A postage deposit will be required prior to go live.  For the quoted prices to apply InfoSend must have the right to combine data files sent by your organization with other files you have sent, when possible. Higher pricing applies if files must be printed separately.  <i>Pricing assumes the use of materials options listed in the below section.</i>	Per Item	Options Below:
		All Document Types (Per Sheet)	
		All sheets are billed at the same rate regardless of color choices or simplex/duplex.	
		Printing 8.5"x11"	\$0.045 (\$45.00 per thousand)
		OR	
		Printing 8.5"x14"	\$0.049 (\$49.00 per thousand)
		<b>Batch Preparation Fee</b>	\$20.00 per batch
		This applies ONLY to batches/jobs with less than 500 pages	
		<b>Multiple Page Mail Piece Surcharge – Handwork</b>	\$0.30 per mail piece
		<b>Postage (for all job types)</b>	Pass Through
		You will be invoiced for the exact postage used. You must use one of the two USPS approved Move Update methods to get the presort discounts:	

## Material Component Fees – Data Processing Print & Mail Service

Materials	Statement, Invoice, or Letter Paper Stock		
	<b>All Documents: white paper stock with or without perforation(s).</b> Price includes all inventory costs. Costs are for production materials only. Please see below for Client supply.  All of your content will be digitally printed on the plain white paper in black, black plus one color, or full color per the printing option from the prior table that you select before implementation.	Per Sheet :	
		Weight 24#	
		-8.5"x11"	\$0.011 (\$11.00 per thousand)
		-8.5"x14"	\$0.0125 (\$12.50 per thousand)
		<b>Or</b>	
		Weight 28#	
		-8.5"x11"	\$0.0155 (\$15.50 per thousand)
		-8.5"x14"	\$0.0175 (\$17.50 per thousand)
	<b>Client requested supply white paper stock with or without perforation(s).</b>	Weight 28# -8.5"x14"	\$0.022 (\$22.00 per thousand) PLUS \$10 Handling fee in addition to actual shipping costs.
	InfoSend Produced Inserts		
	<b>All inserts: white paper stock</b> Paper is 24#. Price includes materials, printing, folding and inserting and cutting to size if necessary. Price includes all inventory costs.	Per insert	Options Below:
		8.5"x11" duplex as shown in Exhibit 2 Min order quantity of 100,000 pieces	
		Full Color 4/4	\$0.049 (\$49.00 per thousand)
		<b>Or</b>	
		Grayscale 1/1	\$0.037 (\$37.00 per thousand)
		8.5"x3.33" simplex as show in Exhibit 3 (per trimmed insert) Min order quantity of 100,000 pieces	
		Simplex one color	\$0.025 (\$25.00 per thousand)
		8.5"x11" simplex as shown in Exhibit 8 Min order quantity of 10,000 pieces	
		Simplex one color plus black (2/0)	\$0.091 (\$91.00 per thousand)

## Pricing: Turnkey Data Processing Print & Mail Service

### Optional Services

<b>Electronic Address Updates – NCOALink or ACS</b> Per reported update. InfoSend electronically reports the addresses it received in your data that need to be updated because the customer filed a Change of Address Report with the USPS. Cost is per update.	Per update	\$0.30
<b>Print Image Archive</b> Each bill is stored as a PDF and indexed in a database. Search by account number or other key fields. You are charged one up-front fee per document to process it, index it, and store it for a set number of months. The PDFs are accessed using a browser-based application that is accessed by logging in to the InfoSend website. Third party applications can also access the PDFs via a lightweight API with no cost increase to the unit fees. Setup fees may apply depending on your configuration needs.  <i><b>This service includes outbound mail tracking at no additional cost.</b> You can view USPS-provided mail tracking data from the same interface that you use to view PDFs of the printed bills. <b>Only available with mail sent using 1st Class Postage, and not available in some cases with postcard mailings.</b></i>	Per PDF (No Set-up Fee)	\$0.01 - For 12 Months of Retention  \$0.017 - For 18 Months of Retention  \$0.022 - For 24 Months of Retention  \$0.027 - For 36 Months of Retention
<b>FinalDoc CD</b> This CD archiving service is a simple and cost effective way for you to retain document images long-term. You can search by account number or name. The documents are stored on the CD in PDF format. FinalDoc CD is used by your staff to look up individual documents.	Per CD	\$95.00 + Shipping & Handling

The selected Consultant will be required to provide insurance coverage in the amount of \$1,000,000 General Liability Insurance. This amount of insurance coverage shall be reflected in your estimated professional fee.

InfoSend does not charge 'separate additional' fees due to providing insurance coverage.

The Consultant shall provide within five (5) days after the Notice of Award is issued a certificate of liability insurance naming the County of San Luis Obispo and its employees and officers as additionally named insured. This shall be maintained in full force and effect for the duration of the contract and must be in an amount and format satisfactory to the County.

InfoSend will fully meet this requirement.

See Attached Appendix A – Sample Contract for complete insurance and indemnification requirements.

InfoSend has reviewed and has no objections to these requirements.

# Response to Scope of Work

The Vendor will:

- Work with the county programmers to receive, send, and verify appropriate files in a format acceptable to the county.

InfoSend will fully meet this requirement. In addition, multiple file transfer methods are available, including FTP/SFTP with PGP encryption and HTTPS Secure Web Upload.

- Provide samples for final approval by County prior to processing full print jobs.

## Sample Approval

InfoSend can provide PDF samples of your documents before they are printed or loaded to the eBusiness system. An email is sent out to the appropriate contacts when Samples are ready for review, with a link to InfoSend's website. Usernames and passwords are assigned to each individual who needs access to the secure website. A screenshot of the sample approval window is shown on the right.



- Work with County to assure proper format.

InfoSend will fully meet this requirement. Partial or corrupt file uploads are detected, quarantined and InfoSend support personnel are notified. Once a file has successfully been transferred it is put through the following checks. If exceptions are found the client output is halted and personnel are notified to review and escalate as necessary:

### File Level Validation and Job Code Assignment

Verify file by naming convention or source to assign client value or file will halt.

Verify file is unique with MD5 hash check comparison to previous files or file will halt.

If the document output is comprised of multiple input files, validation is run to ensure all supplemental files are present or file will halt.

Once file level validation is complete, a unique InfoSend Job Code ID is created.

### File Content Validation and Analysis

A client document specific parsing program is run to validate the file format.

All contents must adhere to known client specification or file will halt.

A record count is generated and supplied to the client in advance of document composition.

The data is scanned and all date values must be within a client-defined threshold or the file will halt.

Optionally, client specific checks at the data level are defined and provided by InfoSend. For example: documents over a certain dollar value can cause a file to halt.

- Print Bills, Notices, and Letters and some variable data, including adding and printing intelligent mail barcodes ("IMB").

InfoSend will fully meet this requirement.

## Address Validation and Presorting



All addresses are put through CASS certified address validation. InfoSend creates the USPS Full-Service Intelligent Mail Barcode, and digitally presorts the addresses. Exact pass-through postage is how we will invoice you for postage unless you specifically request a flat average per-piece postage rate. With pass-through postage InfoSend obtains the Full Service discount and passes it on to you. InfoSend will obtain the maximum presort postage discounts for you. InfoSend puts extensive effort into staying compliant with all USPS rules, regulations, and workflow rules to minimize your postage costs.

- Supply and quote cost for each type of paper to be used in print jobs.

InfoSend will fully meet this requirement. Please see Fee section for all pricing.

- Print in full color or black and white as specified. Vendor may quote costs for laser jet, inkjet or other printing methods.

InfoSend will fully meet this requirement. Please see Fee section for all pricing. All prices quoted for Tax Documents are for inkjet printing.

- Print on one or both sides of paper as specified by the County in each print job.

InfoSend will fully meet this requirement as specified by the County.

- Fold, insert and seal the Bills, Notices, and Letters, remittance envelopes, and other inserts as required into master envelopes.

InfoSend will fully meet this requirement.

- Provide for up to six pieces to be inserted into each envelope.
  - Tax Bills or Letters.
  - Remittance envelopes (standard size #9). Insertion quantity may be zero, one, or two, as specified by a code printed on the tax bill.
  - Other inserts may be 8 ½" x 3 2/3" or 8 ½" x 11" or 8 ½" x 14" as specified in each job.
  - Mailing addresses will be printed in an area to allow the address to be seen through the window on the envelope.

InfoSend will fully meet this requirement.

- Provide capability for different folds as required to insert and make mailing address visible through master envelope window.

InfoSend will fully meet this requirement and work with the County to assure the mailing address is visible and passes USPS testing.

- Where perforations are used, folds must be on perforations.

InfoSend will fully meet this requirement. Per the question asked prior to due date, the County's perforations at 3" and 6" will allow for folds to be on perforations.

- Provide "house-holding" services
  - Identify multiple mail items going to the exact same name and address, and consolidate these into one master envelope or package to save postage and provide better service to taxpayers.
  - Both the name and the address must be an exact match to be house-held.
  - Use different sized master envelopes or packages, depending on the number of consolidated items. An approximate distribution of such items is included as Exhibits 4 and 6.
  - Vendor must include with quote how many tax bills can be stuffed into each type of master envelope (#10 window, 10" x 15" window, or larger package)

InfoSend will fully meet these requirements. InfoSend's "householding" process meets the needs of the County's request for processing, batching and inserting multiple bills to be mailed to a single customer. InfoSend programs



for these instances during the implementation based on the criteria for matching the required bills. Generally the criteria are name and address match, however other criteria can be used if a data tag for the condition exists.

A breakdown of standard consolidation is provided:

Mail operations can do up to 3 pages on the machines in a #10 envelope (with the size of your form and the 2 inserts/2 remit envelopes)

4-6 pages can go into a #10 envelope manually by our Quality Control Department.

7-30 pages can go into a flat window envelope (your 10"x15" windowed)

31-75 pages can go into a priority envelope

76+ pages can go into a box.

- Presort mailings in order to minimize postage cost. Specify how presort will be done and how it will minimize postage costs for the County.

InfoSend fully meets this requirement. All addresses are put through CASS certified address validation. InfoSend creates the USPS Full-Service Intelligent Mail Barcode, and digitally presorts the addresses. Exact pass-through postage is how we will invoice you for postage unless you specifically request a flat average per-piece postage rate. With pass-through postage InfoSend obtains the Full Service discount and passes it on to you. InfoSend will obtain the maximum presort postage discounts for you. InfoSend puts extensive effort into staying compliant with all USPS rules, regulations, and workflow rules to minimize your postage costs.

- Deliver stuffed, folded, sealed, and presorted envelopes to the United States Post Office location specified by the County.

The County's mail would be inducted into the mail-stream from our Anaheim CA production facility. InfoSend's Anaheim facilities are designated as a USPS Detached Mail Unit (DMU). Having DMU status means that outbound first class mail is inspected by USPS employees directly at our production facility, removing the need for our mail to be inspected after delivery to the USPS. Mail that is presorted at InfoSend's facility is able to directly enter the postal distribution system, ensuring you receive the fastest possible delivery times.

- Prepare all USPS paper work for mailing efficiency and provide copies to the County.

InfoSend will fully meet this requirement. Postal Paperwork is generated and available to the County upon request.

- Use County's Postal Permit accounts as specified.

InfoSend will fully meet this requirement.

- Provide reports to County on mailings, bad addresses, and others reports as specified.

InfoSend will fully meet this requirement.

- Manage processing of all mailing files through NCOA and CASS, and provide reporting back to County. Replace abbreviated City names included in County-delivered electronic files with actual name so "Full Service" with USPS certification will be accurate.
  - If an item does not qualify for IMB as addressed, and no forwarding address is available, vendor will mail to the bad address anyway (as required under California Revenue & Taxation Code).



- If an item does not qualify for IMB as addressed, but there is a better address available through NCOA, vendor will not mail the item, and instead will return a file to the County showing both the original and the forwarding address. Vendor will not bill the County for postage for such items.
- For all items above, Vendor must provide a report including batch, page, reject type, and better address if available.


InfoSend will fully meet these requirements.

- Where possible, quote each cost item separately, with fixed and variable costs separated. Quote variable costs as per thousand pieces, so the County may better understand how changes in quantities will affect costs.

InfoSend will fully meet this requirement. Please see Fee section for all pricing.

- Describe invoicing processes and level of itemization of invoices.

InfoSend standard invoicing is to mail monthly invoices, net 30. Invoices can be mailed or emailed or both. Sample invoice is below.



4240 E. La Palma Avenue  
Anaheim, CA 92807-1816  
Phone: 714.993.2690 • Fax: 714.993.1306


**INVOICE**

**CUSTOMER**

ATTN: John Doe  
SAMPLE CUSTOMER STATEMENT  
123 MAIN STREET  
CITY, STATE, ZIP


AMOUNT PAID	DATE	INVOICE NO.
	10/17/2012	12345

**MAKE CHECKS PAYABLE TO**



INFOSEND, INC  
4240 E. La Palma Ave.  
Anaheim, CA 92807-1816

☐ CHECK BOX FOR MAILING ADDRESS CHANGE, PLEASE INDICATE CHANGES ON THE REVERSE SIDE. PLEASE DETACH AND RETURN UPPER SECTION WITH PAYMENT

 <p>4240 E. La Palma Avenue Anaheim, CA 92807-1816 Phone: 714.993.2690 Fax: 714.993.1306</p>	TERMS	DUE DATE	P.O. #	ACCOUNT #	INVOICE
	NET 30	11/16/2012		2944	12345

DATE	DESCRIPTION	QTY	RATE	AMOUNT
10/13/12 thru 10/17/12	INSERTS - UNDERSTANDING RATE STRUCTURE (Print Fee)	103,950		
10/13/12	INF1012A: Statement Postage (Level-1 Sort) (3839 Mailpieces)	1		
	INF1012A: Statement Postage (Non Bar-Coded)	28		
	INF1012A: Data Processing/Laser/Mail Prep	103,867		
	INF1012A: Custom Forms	103,867		
	INF1012A: Custom Outgoing Envelope Stock	103,867		
	INF1012A: Custom Return Envelope Stock	103,804		
	INSERTS - UNDERSTANDING RATE STRUCTURE (Insertion Fee)	103,867		
	INF1012A: INF121011N.001, INF121011N.001			
THANK YOU FOR YOUR BUSINESS		<b>Total</b>		

- Describe how postage costs will be handled, where mailing pieces do not qualify for use of the County's presort/bulk permit.

InfoSend will meter this mail and invoice the County at a 'pass thru' rate.

- Describe how workflow processes and status of jobs will be communicated.

## **Data Processing, Printing & Mailing**

InfoSend employs a comprehensive set of software, hardware, process and personnel control measures to ensure quality, reliability and transparent communication as data files are processed through our systems. InfoSend's 18-year history working with and learning from a diverse array of industries (government sector, utilities, healthcare, financial, etc.), along with an emphasis on continual improvements, has ensured a robust process for assuring the quality and integrity of every batch we process.

The following processes and methodologies are utilized to ensure the quality processing of every batch.

### **Data:**

- **Secure File Uploads:** Password protected or PGP/GPG encrypted data files can be sent to InfoSend via FTP or SFTP. Clients can also log in to InfoSend's secure website and upload files using our bit SSL file upload tool. All file upload methods are HIPAA and PCI compliant. When a file is received, it is automatically time stamped and logged in InfoSend's Job Tracking database.
- **Process Confirmation:** Successfully transferred files are identified by batch type, resulting in a confirmation receipt sent to the County.
- **Duplicate File Prevention:** All data transfers are checked against our file archives for duplicates to ensure that the system does not process previously transferred batches. If a duplicate is detected, the processing program is halted and a warning is generated, calling for immediate follow up by InfoSend support personnel.
- **File Integrity & Date Checks:** Each of InfoSend's programs are custom made to work with the biller's specific data file format. Incomplete or erroneous data will result in a program halt, issuing a warning that is escalated to InfoSend support personnel for immediate follow up. Additionally, InfoSend programs are set up to check for individual bill dates older than a certain threshold and can halt, issuing a warning and escalation as well. InfoSend makes every effort to catch data issues before providing samples or printing a batch.
- **Sample Review:** once a file has successfully been rendered, the biller will have the option to review a sample file containing a PDF output of the print file. Sample outputs can contain a percentage of the billing file or the complete batch. The biller is provided the option to either reject and resend their data file with corrections, or approve the batch. Once files are approved, they are released into InfoSend's print queue.

### **Print Production**

- **Operator Controls:** Once a sample file batch has been approved for printing, files are sent to the print production queue. InfoSend production staff with password permissions access queued files. Our unique Central Print program monitors print jobs in the production department. Central Print prohibits a job from being printed more than once, and provides operator controls including timestamps of printing time and other tracking metrics.
- **Job Ticket:** A job ticket is attached during processing to each production run. A job ticket contains information such as printing specifications, form type, envelope options, and whether an insert should

accompany the file. The job ticket is printed in our production department, and remains with a job until it is released to the USPS for mailing.

- **Postal Paperwork:** In addition to the job ticket, each file is accompanied by unique postal paperwork. Presorting and postage information is calculated during processing. InfoSend's production department prints postal paperwork out along with the job ticket, and uses this to reference a job's mailing specifications.
- **Job Priority:** Jobs are printed on an as-received basis, with jobs requiring the shortest turnaround time given priority. InfoSend is committed to meeting each of our clients' agreed upon mail turnaround times, and is staffed and equipped accordingly. Standard turnaround time is 24 business hours (next business day).

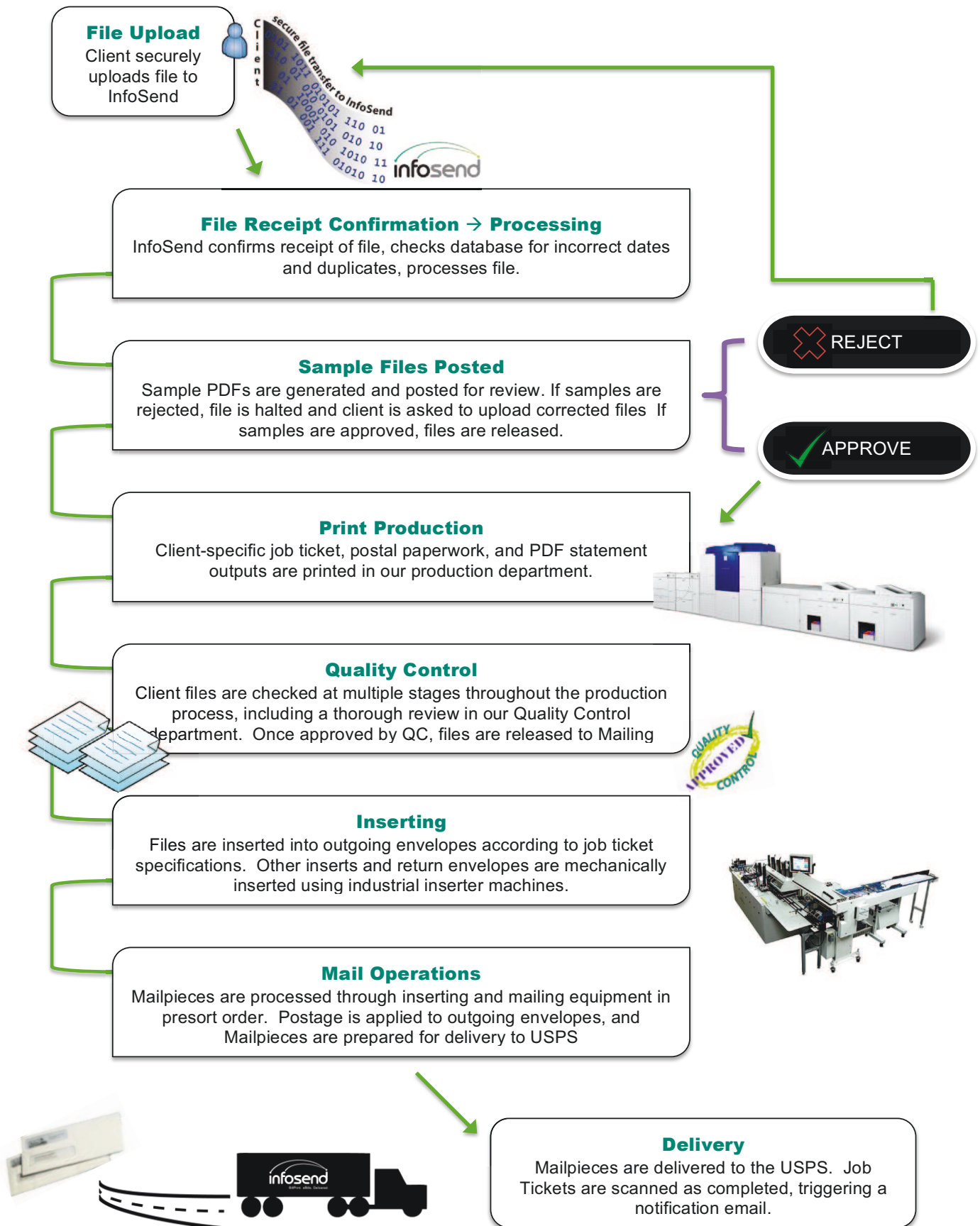
### **Quality Control**

- **Physical Bill Inspection:** Each job is thoroughly checked a minimum of 4 times for general alignment, printing, color or mailing address block issues which would result in problematic processing or mailing: before printing, after printing, upon delivery to the QC department and finally upon delivery to the mailing department.
- **-Uniquely Tailored QC Program:** InfoSend has an internally developed workflow that provides onscreen prompts to QC personnel, requesting they check for bill specific information (such as customer name, account number, address) on randomly selected pages throughout the batch. These onscreen prompts are customized to the biller's data, and ensure the integrity of data throughout the batch before releasing to the mailing department.

### **Mail Operations**

- **Intelligent Mail Inserting:** All mail pieces are uniquely numbered and given a 2D barcode. InfoSend utilizes barcode readers on all inserting equipment, and all barcodes are read before and after insertion. Proper sequencing and handling is enforced so no insertion errors or double stuffing can result without a complete halting of the process and escalation for operator review.

The following page contains a visual representation of InfoSend's file process flow for data processing, printing & mailing jobs.



- Describe Customer Service support.

Critical Issues: Response in 0-30 minutes. A Critical Issue would be one which impacts a live (or past) production job which requires immediate attention. Critical Issues are best communicated to the Client Services team via phone call, at which point the response will be immediate. Example: a batch of data was approved for mailing but needs to be halted immediately.

Mid-Level Support Issues: Response in 30-90 minutes. Mid-Level issues should be communicate via phone or over email. Example: a question comes up regarding programming logic for a document, but does not impact a live job.

General Inquiries: Response in 90 minutes-4 hours. Non-critical support inquiries which can be researched and answered by staff on a first-in, first-out basis. Example: an inquiry regarding the amount of custom material stock on hand.

Client services can be reached by our 800 number, via email, or through our online ticketing system. An account manager will route the issue to the proper channels. The account manager will be the clients contact during all issues. Escalation to the correct department, issue investigation, solution, and resolution will all be communicated through your Client Services support contact.

- Describe any performance guarantees, and adjustments to costs that would be made if a mailing deadline were missed, due entirely to vendor's failure to perform, and under what circumstances.

InfoSend takes very seriously the relationships it cultivates with its clients. We are extremely proud of the fact that we have not had a client discontinue service for cause in our 19-year history, and we'd like to continue that record. Each of our policies is set with service level agreements in mind. In regards to service level agreements, InfoSend abides by the following provisions:

- Time
  - Upon award of contract, InfoSend programmers will review the Client's data files and will estimate programming and implementation time. InfoSend Account Managers and the Client's project team will have a kick off call to discuss implementation timelines and project deliverables. InfoSend takes very seriously implementation timelines, and makes every effort for projects to go-live on time. InfoSend account managers and programmers are dependent on information from the Client, therefore we ask that the Client assign a dedicated project team that will serve as the main point of contact for information during the implementation process.
- Performance
  - InfoSend has implemented over 400 unique clients, each with different types of data and other requirements. Because of our vast implementation experience, we are confident that we have the facilities to successfully launch the print and mail projects required by the Client. We have thoroughly reviewed data requirements outlined in this RFP and believe that each of the Client's requirements fall within InfoSend's normal operating procedures. All InfoSend processes are transparent to the Client, the end user. During implementation, and after go-live, InfoSend invites and provides tools for the Client to review the progression and accuracy of its print and mail statements. All jobs must be verified as approved before printing and release to InfoSend's other departments.
- Security
  - The security of our clients' data is one of our utmost priorities. InfoSend employs many different tiers of security levels in order to ensure the safety of the data we process. Please refer to the security of this response for a detailed description of our security policies.
- Availability
  - Upon award of the contract, InfoSend will immediately assign a dedicated Account Manager. The Client's Account Manager will be responsible for maintaining communications with the Client throughout the implementation process.

- Our Client Services department is available Monday through Friday from 6:00 AM to 6:00 PM Pacific. If you require emergency assistance outside of our normal operating hours, you may call the InfoSend 24-hour support answering service. Support for critical issues is provided 24/7/365 with 4 hour or less response via an answering service.

Sample:

InfoSend is a service provider. As such, Client acknowledges that data processing involves the risk of human and machine errors. Except as otherwise provided for in this Agreement, InfoSend shall not be liable for any errors, omissions, delays or losses. In no event shall InfoSend be liable for indirect, special or consequential damages even if InfoSend has been advised of the possibility of such potential loss or damage. The foregoing limitation of liability and exclusion of certain damages shall apply regardless of the success or effectiveness of other remedies. Notwithstanding anything to the contrary contained herein, InfoSend shall not be responsible for delays in receipt of Client information or processing Client information because of causes beyond its reasonable control, including, without limitation, failures or limitations on the availability of third party telecommunications or other transmission facilities, and Client's failure to properly enter and/or transmit information. An exception to the limitation of liability is the Service Level Agreement ("SLA"). The SLA applies even in the case of a natural disaster or other issue that necessitates the transfer of the Service to a disaster recovery facility. InfoSend and Client agree on the following SLA:

- Documents will be printed exactly as displayed in the Client-approved sample file.
- Documents will be printed on the correct forms and inserted into the correct envelopes.
- The documents will be printed and mailed the same business day. See Exhibit A for details on the specific deadlines that Client and InfoSend must meet to facilitate same-day printing and mailing of Client data.

If the above SLA is not met, a 10% Service Fee penalty will be provided for each business day that a batch of bills is delayed. The penalty would apply to InfoSend's Service Fees only and not to postage or materials (bill stock, envelope stock, etc.). If the data is not printed as displayed in the Client-approved sample file, a 50% Service Fee credit will be provided if the issue did not impact all documents in the batch or did not impact the ability for customers to understand the documents and remit payments. If the issue affected all documents in the batch or impacted the ability for the customer to understand the document, a 100% Service Fee credit will be applied (e.g. the wrong data was printed due to an InfoSend data processing error).



# Appendix A: Additional Company Information

## InfoSend Solutions

We recognize our clients' unique needs by personalizing the way we build solutions for each account. InfoSend configures each service to work together, providing custom solutions for your organization. InfoSend does not simply mail out bills and present them online to enable payments. We tailor our products and services to suit client needs in a way that makes us an extension of both your finance and customer service departments. Our clients often rely on us to build solutions that their own systems may not support. By using our platform you can create a unified look and feel for both your print and electronic bills. By using InfoSend's platform you can manage all data using online account management tools and use our bill design expertise to accomplish a unified look and feel for all your billing documents and customer communications.

## Print & Mail Service

### Overview:

- Your data is processed, address validated, presorted, printed, put through Quality Control prior to being released to the mailing department.
- Documents are folded, inserted, and mailed per the turnaround time listed in the pricing section.
- Print & Mail – printing and mailing of statements, invoices, and other bills and notices.
- Direct Communications – one-time print only or print and mail projects, marketing mailings
- Online job tracking and detailed reports make it easy to monitor and audit the process.

### Standard Features:

#### Paper Stock

Documents are printed onto white 24lb paper stock. Any bill or letter that requires a tear-off remittance stub will include a micro perforation for a clean and smooth edge (lockbox compatible).

#### Envelopes

You will receive the lowest possible envelope price by using one of InfoSend's standard #10 outgoing envelopes (both 1 and 2 window versions available) and standard #9 single window return. We order millions of these each month and pass the savings on to you. Envelopes contain security film and tint. They are compatible with the bulk letter opening machines used by your remittance processing department or lockbox vendor. Custom envelopes are available but highly discouraged as they increase cost and complicate disaster recovery efforts since custom envelopes are only stored at one of the three production facilities.

Your name and logo will appear through one of the standard #10 outgoing envelopes. Should you utilize the double window standard envelope then your return address will show in the upper window and the customer address in the lower window. With the single window standard envelope your addresses are on the same location on your printed document but there is space in between the addresses and to the right of them to show information that you want customers to see before they open the envelope. You can print messages such as "FINAL BILL ENCLOSED" to encourage the customer to open the envelope. Envelopes use sustainably sourced paper stock.

#### Printing

Documents are either printed using high-speed production laser printers or production **full color** inkjet printing. Options include black, grayscale, black plus one or more spot colors, and full color printing.

Documents printed at the Anaheim facility are printed using roll fed full color production inkjet technology. Black, spot color, and full color (CMYK) printing are all supported. Inserts can be printed inline as additional pages, therefore eliminating the waste associated with preprinted materials.



## Quality Control

InfoSend's Quality Control (QC) is one of the company's most unique internal programs. Printed documents are always put through a QC process before being released to the mailing department.

## High Speed Mail Inserting

Printed documents are inserted using high-speed production inserters. Inserters are computerized and networked in order to provide automated quality control functionality and monitoring. Mail piece integrity software ensures document sequencing is correct and that inserting errors do not occur with a defect rate of less than 1 in 1 million. Production mailing equipment is extremely expensive and challenging for most organizations to operate. Leverage InfoSend's economies of scale by outsourcing your mailing.

## Induction to the USPS

InfoSend's Anaheim and Downers Grove facilities are designated as a USPS Detached Mail Unit (DMU). Having DMU status means that outbound first class mail is inspected by USPS employees directly at our production facility, removing the need for our mail to be inspected after delivery to the USPS. Mail that is presorted at InfoSend's facility is able to directly enter the postal distribution system, ensuring you receive the fastest possible delivery times.

## Print & Mail Service: Optional Services

### Address Updates

Both NCOA (National Change of Address) and ACS (Address Change Service) are available. By selecting one of these optional services you will receive an electronic report of address updates from the USPS's change of address update if your customer files and address change and does not give you the updated address. When NCOA is utilized the new address is printed on your document before mailing. With ACS the original address is printed and the USPS applies the new address to the envelope before delivering to that new address.

### Exception Processing

Exception Processing, or EP, is an optional service that allows you to approve, cancel, or hold individual bills based on predetermined criteria. You may choose to flag exception bills within the data, or InfoSend can build the custom exception rules on your behalf. Example: All bills with dollar amounts over \$500,000, or less than \$5.00, can be posted to the InfoSend website for individual approval. *Please inform us if you would like a price for this service.*

### Print Image Archive

The Print Image Archive is an optional service. This is a document archiving tool used by your customer service representatives to download PDF copies of any document that InfoSend mails. You can also choose to have InfoSend store paperless documents in the archive to give you one central location to view all paper and electronic bills. Your support representatives can use this service to research customer inquiries by viewing an exact copy of the printed bill.

This service can be used to reproduce exact copies of your printed bills. A screenshot of the application's search form is included below. You can pick up to 3 custom fields to index. For example the "Bill Date", "Due Date", and "Service Address" fields in the image below were added to the search form and mapped to the custom data file format for a utility client of ours.

415493 Total Record(s)  
PLEASE ENTER SEARCH CRITERIA BELOW TO DISPLAY RECORDS

Name:

Account Number:

Job Code:

Bill Date:

Due Date:

Service Address:

Received Date (MM-DD-YY):  To

SPCL Status:

**If you purchase the Print Image Archive service then you will automatically get mail tracking at no additional cost!**

Mail tracking data will be accessible via the Print Image Archive interface. InfoSend stores the Intelligent Mail Barcode tracing information supplied by the USPS. The USPS scans the barcode as the mail moves through their system. You can



use the tracking information to verify that individual bills were mailed and see the timestamps provided by the USPS. *Only available with mail sent using 1st Class Postage, and not available in some cases with postcard mailings.*

Should you purchase the Print Image Archive service then there is no additional service charge from InfoSend to give third party applications access to the archive. You only pay one per PDF archive fee and can access it from the search screen on the InfoSend management portal and let other applications access the documents by integrating with InfoSend's secure API (application program interface). Setup fees may apply depending on your configuration needs.

### **Direct Communications - Inserts**

Selective Inserting is available, which allows you to selectively target insert, flyers, or newsletters to specific mail pieces. Selective Inserting will also allow you to exclude a #9 return envelope for all customers participating in an automatic payment program (ACH). Individual documents can be grouped together ("householding"), if desired. InfoSend gives you multiple insert handling and production options, along with fully featured tools to manage the process:

Insert Requests & Management - InfoSend's online Insert Request Form is an innovative account management tool that streamlines insert management. Request a quote for printing and schedule all of your inserts online. Submit the form through our website and a summary of the request will be returned to the user via email. **elnserts:** InfoSend can also optionally include PDF images of your inserts in the Print Image Archive and/or in the eBills created by InfoSend's eBusiness products.

Insert Handling – Client Provided - Any special inserts/flyers/stuffers prepared by the client can be inserted with the bills. You can drop your inserts off or have them shipped to InfoSend where they will be kept in inventory until the end of the run date.

Insert Printing - InfoSend offers a complete range of insert printing services, from black to full color printing.

- **Inline Inserts** - if your organization often includes static inserts with its bills, InfoSend can convert them to Inline Inserts. An automated process is set up to selectively print the inserts immediately after each bill is printed. This increases your ability to target specific customer types and provide one-to-one messaging. Inline inserts can be printed in black or **full color**.
- **Offline Inserts** – traditional inserts are printed offline and then inserted with designated billing statements. Up to 5 offline inserts can be included with a bill run.

### **Direct Communications – Postcards and Envelope Messaging**

- **Postcards** - recurring postcard jobs can be setup to send cost effective hard copy communications to your customers or prospective customers. Small postcards qualify for the discounted postcard postage rate. Email marketing is not effective due to spam filters and customer email overload. Postcards are the most effective type of direct marketing and communications.
- **Show Document Messages through the Envelope Window** - Important messages can be printed on your documents in black or **full color** and shown through the outgoing envelope window. This is the most economical form of showing brief messages or images to the customer before they open the mail piece. This can help incentivize the customer to open the envelope right away by printing messages such as "INVOICE ENCLOSED".
- **Print Messages on the Outside of the Standard Envelope** - Custom messages and images can be printed onto the standard InfoSend #10 double window envelope. This allows you to print a high amount of content on the outside of the envelope as you can print on both sides of the envelope. This type of printing is referred to as "sniping" and usually used to print temporary content on a month or two worth of envelope stock. It is more cost effective to digitally inkjet print this content onto pre-manufactured envelopes than to order truly custom stock that was manufactured specifically for you.

### **Direct Communications – One Time Mailings**

One-time print and mail projects can be setup relatively quickly. They can be used in scenarios where an insert will not work and the topic you are communicating must be sent out as a separate mailing.

- Examples are customer rate change notices or any other important notices that must be sent separately from your bills or other regular mailings.
- Expedited projects are possible if you have an emergency and must send out a notification on short notice.
- Example formats are postcards, letters that are inserted into a #10 envelope and letters that are folded and tabbed.

## Locations

### Corporate Headquarters & Western US Production Facility

4240 E. La Palma Ave • Anaheim CA 92807

InfoSend owns and operates its 77,000 sq. ft. headquarters and Western US production facility. This facility sits on a 4.3-acre lot and is one of the premier bill processing centers in California. *This facility has a 600KW backup generator that can power the entire facility if the electricity goes out.* It provides disaster recovery to the other facilities. InfoSend's Anaheim facility is designated as a USPS Detached Mail Unit (DMU) with USPS representatives on-site.

Picture of the front of the Anaheim production facility:



Picture of the 1000 gallon 600KW backup generator:



### Midwest & Northeastern US Production Facility

1406 Centre Circle • Downers Grove IL 60515

InfoSend's 25,000 sq. ft. Midwest production and disaster recovery facility is located just west of Chicago, Illinois. This facility is used to process mail for clients located in the Midwest or Northeast. The Midwest facility also serves as an out of state disaster recovery facility for the other facilities. InfoSend Midwest is also a USPS DMU with USPS representatives on-site. As with the Anaheim facility this property is owned by InfoSend's principals. Picture of the Downers Grove production facility:



### Texas & Southeastern US Production Facility

1624 W Crosby Road #128 • Carrollton TX 75006

InfoSend's 10,000 sq. ft. Texas Production facility is located near Dallas and is the main production center for clients in the South and the Southeast. This facility also provides out-of-state disaster recovery for InfoSend's other locations.